



PROJECT DOCUMENTATION

SRT - Service Request Tracker

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 Task Management Solution

SRT Tracker

Service Request Tracker - CRM Task Management System

An intelligent enterprise-level task management system that automatically distributes and manages CRM Service Requests across multiple agents with smart workload balancing and real-time SLA tracking.

40%

Efficiency Gain

100%

SLA Visibility

Auto

Task Allocation

ICON

Award Winner

The Challenge & Solution

✗ The Problem

Service requests were manually assigned to agents, leading to uneven workload distribution and frequent SLA breaches. There was no real-time tracking of request status, priority, or elapsed time. Team supervisors had no visibility into who was working on what, making performance monitoring nearly impossible. Agents often worked on the same request simultaneously, causing confusion and duplication of effort.

✓ The Solution

SRT Tracker implements intelligent round-robin auto-allocation that distributes service requests equally among all online agents. It provides real-time SLA monitoring with automatic priority escalation (Low → Medium → High → Critical), exclusive SR locking to prevent duplication, and comprehensive reporting for performance tracking. The system transforms chaotic manual assignment into a smooth, automated workflow.



Key Features

Intelligent automation that keeps your team productive and SLAs on track



Smart Auto-Allocation

Intelligent round-robin distribution automatically assigns SRs equally among all online agents, ensuring balanced workload across the entire team.



Real-Time Assignment

Live SR assignment and status updates with automatic reallocation when agents log out, ensuring no request is left unattended.



Exclusive Locking

Double-click to lock SRs for exclusive processing, preventing interference from other agents and eliminating duplicate work.



Automatic Priority Escalation

Real-time priority and SLA calculations based on SR type and elapsed time, with automatic escalation from Low to Critical status.



Role-Based Access

Different user roles (SR Agent, Email Agent, L2 Agent) with appropriate permissions and customized dashboard views.



Real-Time Reporting

Comprehensive reports for pending/closed SRs with multiple filtering options, export capabilities, and performance analytics.



User Account Management

Self-service account creation, password reset, and profile management with automated email notifications.



Availability Status

Status options (Tea break, Lunch, Meeting) to prevent auto-logout while maintaining accurate workload distribution.



Technical Stack

Built with proven technologies for reliability and performance

MS Access Compiled Database (.accde)

Custom UI Forms & Controls

Event-Driven VBA Programming

MS Access Database Engine

ADO/DAO Data Connections

SQL Query Optimization

Excel Automation & Reporting

Email Notification System

Business Impact

Transforming team productivity and SLA compliance



40% Efficiency Gain

Eliminated manual assignment overhead and reduced time spent on task allocation



Balanced Workload

Fair distribution ensures no agent is overloaded while others are idle



Zero SLA Blindness

Real-time visibility prevents SLA breaches through automatic escalation



100% Cost Savings

In-house development eliminated external vendor costs entirely



ICON Award Winner

Recognized for exceptional innovation and measurable business impact



Better Team Performance

Clear metrics and reporting enable data-driven performance management



Intelligent Automation

Behind-the-scenes features that make everything work seamlessly



Smart Filtering

Automatically ignores "Voluntary" SRs and "Non-EBS Segments" from processing, focusing only on actionable requests.



Intelligent Routing

Routes SRs to appropriate buckets (CLE Agent, DataLink Agent, SR Agent, L2 Agent) based on barring/restoration reasons.



Smart Reconciliation

Automatic reconciliation between new Report900 data and existing SRT records with appropriate status updates and duplicate prevention.



System Requirements



Microsoft Access

2016 or later version required [64bit]



Operating System

Windows 10/11 [64bit]



Memory

2GB RAM minimum (4GB recommended)



Drive Requirement

D: drive must be available [100MB free space]



Excel Integration

Microsoft Excel for export features



Email Support

Outlook for notifications (optional)



1

Download & Extract

Download `SRT_System.zip` (~6 MB) and extract directly to `D:\` drive. This creates the complete folder structure at `D:\SRT_System\`.

2

Launch Application

Navigate to `D:\SRT_System\` and double-click `SRT_Frontend.accde` to launch the application.

3

Login or Create Account

Demo login credentials are displayed on the login screen for immediate access. If you want to create a new login account, you have the option to do so anytime. The application will attempt to send email notifications—if your Outlook is not configured, simply cancel the email request. Your new account will still be created successfully without breaking any code. Don't worry, the entire application will continue to run smoothly!

4

Set Availability Status

Set your availability status to prevent auto-logout. Choose from: "I am here", "Tea break", "Lunch break", or "Meeting".

5

Start Processing Requests

SRs will be automatically assigned to you via round-robin allocation. Double-click any SR to lock it for exclusive processing.



How the SRT (Frontend) System Works

SRT is a task management system designed to manage Customer Relationship Management (CRM) Service Requests (SRs). It automatically allocates and re-allocates pending SRs to available online agents.

Key Functionalities:

1. Automatic & Equal Allocation:
 - The system distributes new SRs equally among all online SR Agents.
 - Example: If you upload 10 new SRs and 3 agents are online, SRT will allocate them in a round-robin fashion: SR 1 to Agent 1, SR 2 to Agent 2, SR 3 to Agent 3, SR 4 to Agent 1, SR 5 to Agent 2, and so on.
2. Online Agent Requirement:
 - SRT can only allocate SRs to agents who are logged into the system.
 - Note: If new SRs are uploaded but no agents are online, the SRs will remain in a pending state until an agent logs in.
3. Pending SR Re-allocation:
 - If an agent logs out improperly, the system will automatically remove the "lock" from all SRs assigned to them and re-allocate those SRs to the next available online agent.
4. New SR Allocation:
 - When new SRs are updated in SRT (e.g., from Report900), the system automatically allocates these pending SRs equally to all relevant online agents.
5. Manual SR Locking:
 - Double-clicking an Account Number or SR Number will lock that specific SR for you. A locked SR will not be re-allocated to another agent, and its status cannot be changed by others until you (or the system) unlock it.
 - SRs with a status of Resolved, Closed, or Rejected cannot be unlocked or have their status changed.
6. Comments:
 - All users have the rights to add new comments to any SR.
7. Automatic Calculations:
 - SRT automatically calculates and updates Priority, SLA, and Elapsed Time for each SR.
 - Note: For Credit Limit Enhancement (CLE) SRs, the system only considers Monday to Friday, 9:30 to 18:30, as working hours.

Priority & SLA Definitions:

Category	Priority Levels (Based on Elapsed Time)	SLA Breach Threshold
Non-CLE	Low: 0-1 Hr, Medium: 1-2 Hrs, High: 2-3 Hrs, Critical: >3 Hrs	Out of SLA: > 4 Hours
CLE	Low: 0-9 Hrs, Medium: 9-13.5 Hrs, High: 13.5-18 Hrs, Critical: >18 Hrs	Out of SLA: > 27 Business Hours

CLE: Credit Limit Enhancement. The 27-hour SLA for CLE is equivalent to 3 business days (9:30 AM - 6:30PM).

User Management & Features:

8. Employee Information: Users can view their own information.
9. Session Management:
 - To avoid an automatic logout, users must indicate their availability by selecting a session status:
 - (A) I am here (Extends session by 15 minutes)
 - (B) Tea break (20 minutes)



- (C) Lunch break (45 minutes)
 - (D) Meeting (60 minutes)
 - SRT allows only one active session per user.
10. Roster & Privileges: SR Agents can view their weekly roster and application privileges.
 11. Reports: Users can access real-time reports for both Pending and Closed SRs.
 12. SRT Tickets: Users can log issues or bugs related to the application using this feature.
 13. Self-Service:
 - Users can create new SRT accounts and change their passwords.
 - The "Forgot Password" feature on the login screen allows users to retrieve their password immediately.
 - Using "Create New Account," "Forgot Password," or "Change Password" will trigger an auto-generated email to the user.
 14. Admin Capabilities: Administrators can see who is online and track user activity.
 15. User Tracking: SRT manages user details, including login time, logout time, idle time, and system information.

Important Notes & Guidelines

1. Network Dependency: SRT operates only on a LAN (Local Area Network) connection.
2. Proper Logout Procedure: Agents must log out properly before performing any of the following actions. Failure to do so will cause the system to consider you online and continue allocating SRs to you.
 - Before disconnecting the LAN cable.
 - Before shutting down your laptop/desktop.
 - At the end of your shift.
 - Remedy: If you did not log out successfully, immediately log back in and then log out properly.
3. System Sleep Settings: To prevent disruptions, please increase your laptop/desktop's sleep timer to a minimum of 2 hours.



1.1 Login Screen

- **New Users:** Click the "Create Account" button to register for a new SRT account.
- **Existing Users:** Log in using your credentials (User ID and Password).
- **Forgot Password:** If you have forgotten your password, click the "Forgot Password" button to retrieve it directly.
- **Change Password:** To update your password, click the "Change Password" button.
- **Password Policy:**
 - Passwords must be between 5 and 15 characters long.
 - Passwords are case-sensitive and can use a combination of lowercase letters, uppercase letters, numbers, and symbols.
- **Email Registration:** You must provide a valid official email address for all system communications and future reference.

SRT Logon

Service Request Tracker (SRT)

Login SRT With Your Credentials

LOGIN

Login ID 51406

Password *****

Login Quit

■ [Change Password ?](#)

■ [Forgot Password ?](#)

■ [Create Account ?](#)

Version : Testing

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1.2 Home Screen

- **Employee Information:** Users can view their personal details.
- **Session Management:** To avoid automatic logout, users must indicate their availability by selecting a status from the idle time combo box to extend their session.
- **Roster & Rights:** SR Agents can view their weekly roster and assigned system privileges.
- **Reports:** Users can access real-time SRT reports for both Pending and Closed SRs.
- **Role-Based Access:** SR Agents will only see the application tabs relevant to their assigned rights.
- **SRT Tickets:** Use this feature to log any issues or bugs encountered with the application.

1.3 Agent Screens

- **SR Visibility:** Agents can only see the details of SRs pending for them.
- **Status Update:** Agents can update the status of their SRs, either individually or in bulk.
- **Update Modes:**
 - (A) Single: Update one SR at a time.
 - (B) Bulk by Account: Update multiple SRs associated with a specific Account Number.
 - (C) Bulk by SR Number: Update multiple SRs at once using an Excel template.



1.4 Email Agent Screen

- **SR Visibility:** Email Agents can view details for all SRs (both Closed and Pending) across all agents.
- **Status Change Rights:** They can change the status of SRs (single or bulk), provided the following conditions are met:
 - (A) The SR status is currently "Pending."
 - (B) The SR is not locked by another user.
 - (C) The owner of the SR is either "SR Agent" or "DataLink Agent."
- **Locking Rights:** Email Agents cannot manually lock or unlock any SRs.
- **Comments:** They have the ability to add comments to SRs.
- **Search & Export:** Users can search for SR details using multiple parameters and export the results to Excel.

1.5 Read Only Screen

- **SR Visibility:** Any user can view SR details for all agents, but in a read-only mode.
- **Search & Export:** Users can search for individual or bulk SR details and export the results to Excel.
- **Closure Reports:** Users can export SR closure details to Excel based on a selected date range.

TATA Teleservices SR Details Read Only

Drive Name: D:\

SR Number: Status: Search

Account Number: Priority:

Customer Name: SR Agent:

Bulk Search & Export To Excel

Search

☐ Incident ☐ Upload ☐ Resolved ☐ Closed

Export To Excel Based on Date's
From Date: 01-Jun-16
To Date: 26-Jun-16

Register SRT Bug/Feedback

Comment	SR Number	INCIDENT_DATE	Working	SR_Count	Account_No	Del_Number	Report900_Status	SR_Status	Status_Reasons	Priority	ITS/IE	E_Process
Add	541396775	21-06-2016	<input type="checkbox"/>	1	921389452	9043086506	Open	Open		1. Critical		
Add	541396773	21-06-2016	<input type="checkbox"/>	5	921389452	9043086209	Open	Open		1. Critical		
Add	541390133	20-06-2016	<input type="checkbox"/>	5	920296487	67180000	Open	Open		1. Critical		
Add	541390043	20-06-2016 23:37:00	<input type="checkbox"/>	1	200173679	66603514	Open	Open		1. Critical		
Add	541386783	20-06-2016 22:52:26	<input type="checkbox"/>	5	919644405	66637700	open-Credit validation	Open		1. Critical		
Add	541386713	20-06-2016 22:51:20	<input type="checkbox"/>	5	919644405	66634900	open-Credit validation	Open		1. Critical		
Add	541386561	20-06-2016 22:49:08	<input type="checkbox"/>	5	919644405	66634700	open-Credit validation	Open		1. Critical		
Add	541386513	20-06-2016 22:47:58	<input type="checkbox"/>	5	919644405	66634500	open-Credit validation	Open		1. Critical		
Add	541386421	20-06-2016 22:46:24	<input type="checkbox"/>	5	919644405	66634300	open-Credit validation	Open		1. Critical		
Add	541389454	20-06-2016 21:59:58	<input checked="" type="checkbox"/>	1	989914131	9223992239	Order in progress	Closed		4. Low		
Add	541389454	20-06-2016 21:55:09	<input type="checkbox"/>	1	947897337	11004642	open-Credit validation	Open		1. Critical		
Add	541378139	20-06-2016 20:53:06	<input checked="" type="checkbox"/>		920268023	9212667155	open-Credit validation	Closed		1. Critical		
Add	541378131	20-06-2016 20:53:04	<input checked="" type="checkbox"/>		920268023	9212667153	open-Credit validation	Closed		1. Critical		
Add	541378129	20-06-2016 20:53:02	<input checked="" type="checkbox"/>		920268023	9212667136	open-Credit validation	Closed		1. Critical		

Records: 2 of 166 | No Filter | Search

1.6 Reports

- **Access:** Any user can view, email, or print real-time summaries of SR statuses (Pending/Closed).
- **Closed Reports:** Available for periods such As on Date, This Week, This Month, Last Week, and Last Month.
- **Pending Reports:** Available views include Agent Wise, Bucket Wise, and Status Wise.

TATA SR Pending Summary

SR Status	SR_Agent	In SLA	Out SLA	Total	In SLA %
Error Out		0	13	13	0.0%
Open	Arjun Singh	5	117	122	4.1%
Resolved	Arjun Singh	14	0	14	100.0%
Grand Total :		19	130	149	12.8%

26-Jun-16 02:59 AM Page 1 of 1



1.7 Roster

- **System Availability:** SRT operates 24 hours a day, 7 days a week, 365 days a year, with shift-based scheduling.
- **Roster Management:** Authorized users can update rosters at any time and distribute them via email.
- **Viewing Rosters:** Users can see their own roster details on the Home Screen under the 'Employee Information' tab.

SRT Roster									
		Email Roster	Shift Time Sheet	Update New Agents	Save & Close				
Emp_ID	Emp_Name	Process_Type	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
46756	Kajal Trivedi	CLE Agent	D	C	WO	L	B	D	B
70102	Vijayalakshmi Suresh Kumar	CLE Agent	L	B	A	D	D	D	WO
52373	Manjiri Kavatkar	DataLink Agent	C	C	D	B	A	B	D
52332	Naresh Talreja	DataLink Agent	C	B	WO	A	B	WO	B
52574	Jai Oza	L2 Agent	A	A	D	WO	B	A	C
51749	Raj	L2 Agent	C	B	B	B	B	B	B
ba80417918	Santosh L	L2 Agent	A	B	WO	A	B	D	D
39499	Anil Bommerla	SR Agent	C	C	B	B	WO	WO	B
49123	Chattanya Shukla	SR Agent	A	B	B	B	B	L	L
49071	Mohd Shabeen	SR Agent	L	WO	B	B	B	B	B
10070014	Pooja Tantya	SR Agent	B	B	WO	D	L	D	B
49066	Suhasini P	SR Agent	A	WO	A	C	L	C	WO
ttml3783	Supriya Jagtap	SR Agent	D	D	C	A	C	WO	A

SRT Roster Shift Time Sheet

Shift_Name	Shift_Start_Time	Shift_End_Time
A	07:00 AM	03:00 PM
B	10:00 AM	07:00 PM
C	03:00 PM	11:00 PM
D	11:00 PM	07:00 AM



1.8 SRT Bugs / Requirements

- **Bug Submission:** Users can post details about new bugs or system requirements.
- **Notifications:** Once a new bug is logged, all relevant users will receive an automatic email notification from SRT.
- **Tracking:** The system tracks all bug information, and their current status is visible online to users.

Create New Issue

* All Fields Are Mandatory

Issue Title

Add Error Subject

Assigned To

Related Bug

Due Date

Expected Resolution Date

Issue Type

Priority

Set Priority

Comment

Add Comment

Whom To Resolve

Save

Reset

Close

TATA Teleservices

All Issues Created By You

SRT Bug/Error Details

Add New Bug / Feedback / Requirement

Issue ID :

Status :

Search

Export To Excel

Drive Name D:\

Title :

Priority :

Reset

Assign To :

Issue Created By You

Issue ID	Issue Title	Assigned To	Status	Opened Date	Due Date	Closed Date	Resolved Date	Issue Type	Priority	Over Due Status	Opened By
13	Test	Arjun Singh	Cancelled	25-May-16	28-May-16	30-May-16		SRT	1. Critical	Under Due	Arjun Singh
12	30 Minute Open	Arjun Singh	Open	18-May-16	20-May-16			SRT	1. Critical	Under Due	Arjun Singh
11	Final SR Closu	Arjun Singh	Closed	18-May-16	20-May-16	30-May-16		SRT	1. Critical	Under Due	Arjun Singh
10	Bulk SR Closu	Arjun Singh	Closed	18-May-16	20-May-16			SRT	1. Critical	Under Due	Arjun Singh
9	Add Session F	Arjun Singh	Closed	18-May-16	20-May-16			SRT	1. Critical	Under Due	Arjun Singh
8	Reasons For S	Arjun Singh	Closed	18-May-16	20-May-16			SRT	1. Critical	Under Due	Arjun Singh
7	Not Allow Dupl	Arjun Singh	Closed	18-May-16	20-May-16	30-May-16	19-May-16	SRT	1. Critical	Under Due	Arjun Singh
6	Add one more	Arjun Singh	Closed	18-May-16	20-May-16	30-May-16		SRT	1. Critical	Under Due	Arjun Singh

Record: 1 of 10

No Filter

Search

Comments

Issue ID : 7

Comment Date : 19-05-2016 13:12:32

Add Comment

Done...Now Not Allowed More Than One Session.

Comment ID : 15

Commented By : Arjun Singh

No IP Level Restriction

Issue ID : 7

Comment Date : 18-05-2016 18:52:18

Add Comment

To check on Login window if User is already logins in another system then he will not able to login untill he/she not logged out from previous session

Comment ID : 9

Commented By : Arjun Singh

Record: 1 of 2

No Filter

Search



How SRT (Backend) Works

1 1.1 Steps to Update Backend Report900 (Every 2 Hours)

Objective: To periodically fetch and process the latest SR data from an FTP server and update the SRT database.

Prerequisites:

- Ensure you have access to the FTP server and the local folder D:\Macro_Templates.
- Have the SRT_Backend_A1.1.accde MS Access file ready.

Procedure:

1. **Connect to FTP:**
 - **FTP Address:** ftp://172.17.4.*/Report900/
 - **Login ID:** csoumr
 - **Password:** *****
2. **Download and Process Report900.zip:**
 - Navigate to the Report900 folder on the FTP.
 - Copy the latest Report900.zip file.
 - Paste the file into your local folder: D:\Macro_Templates.
 - Extract the contents of the ZIP file to this location.
 - Open the extracted Excel file.
 - Apply text-to-columns delimitation to the first column using the caret symbol ^.
 - Review the data and correct any rows that may have split incorrectly.
 - Save the file in .xlsx format with the name Final_Report900.xlsx at D:\Macro_Templates\Final_Report900.xlsx.
3. **Download and Process TTL_REPORT_1166 Files (Once Daily):**
 - Navigate to the TTL_REPORT_1166 folder on the FTP.
 - Copy the two most recent files: TTL_REPORT_1166_1_DateTime.zip and TTL_REPORT_1166_2_DateTime.zip.
 - **Note:** If multiple users are performing this update, each must ensure they copy the latest files to their own system daily.
 - Paste these files into D:\Macro_Templates.
 - Extract both ZIP files to this location.
 - Rename the extracted text files to:
 - TTL_REPORT_1166_1.txt
 - TTL_REPORT_1166_2.txt
4. **Run the Backend Macros:**
 - Before proceeding, confirm these three files are present in D:\Macro_Templates:
 - (A) Final_Report900.xlsx
 - (B) TTL_REPORT_1166_1.txt
 - (C) TTL_REPORT_1166_2.txt
 - Open the MS Access file SRT_Backend_A1.1.accde.
 - Click the button **"Update New Report 900"**.
 - Wait for the confirmation message.
 - Click the button **"Result"** to view the Report900 update status.



Ownership & Troubleshooting:

- The users of the tool are responsible for refreshing these files as per the defined SLA (every 2 or 24 hours). Process ownership lies with the designated process owner.
- Route any errors encountered during the upload process to the developer, **Arjun Singh**, for troubleshooting.

2 1.2 SRT Backend Macro Logic

Objective: To define the business rules for sorting, filtering, and updating Service Requests within the SRT system.

Data Processing Rules:

1. **Handling Blank Values:** The macro will update the word "Blank" in every field where the Report900 data is Null or empty.
2. **SR Filtering (Exclusions):**
 - SRT will **ignore** SRs marked as "**Voluntary**".
 - SRT will **ignore** SRs related to "**Non-EBS Segments**". (Refer to the specific Account Segment details for what is included/excluded).
3. **Bucket Assignment Rules:**
 - **CLE Agent Bucket:** SRT will assign "UMR Related" SRs where the Account Segment is related to **EBS**.
 - **DataLink Agent Bucket:** SRs will be assigned here if:
 - The "Barring/Unbarring" reason is "**Barring**" AND the "Assigned User" is like "**TTL RNOC Team**".
 - The "Barring/Unbarring" reason is "**Restoration**" AND the "Assigned User" is like "**TTL RNOC Team**".
 - **L2 Agent Bucket:** SRs will be assigned here if the "Barring/Unbarring" reason is "**Restoration**" AND the "Assigned User" is like "**TTL OP VAS**".
 - **SR Agent Bucket:** SRs will be assigned here if:
 - The "Barring/Unbarring" reason is "**Barring**" AND the "Assigned User" is **NOT** like "*TTL RNOC Team*".
 - The "Barring/Unbarring" reason is "**Restoration**" (and does not meet the L2 or DataLink criteria above).
4. **Handling Existing SRs from New Report900:**
 - If an SR in the new Report900 already exists in SRT, the system will check its status and act as follows:
 - **(a) SRT Status is "Resolved":** The system will automatically **Re-Open** the SR and move it to the **L2 Bucket**.
 - **(b) SRT Status is "Work in progress"/"Open"/"Pending with IT":** The system will take **no action** as the SR is already pending.
 - **(c) SRT Status is "SR Not Related To Credit Control - Reject" or "Not Eligible For CLE - Rejected":** The system will **NOT Re-Open** the SR.
 - **Note:** Agents are responsible for updating SR statuses correctly. Intentionally mislabelling a status as "Rejected" will make the agent accountable for the SR not being re-opened.
5. **Handling SRT SRs Not in New Report900:**
 - For SRs that are in SRT (Pending/Resolved) but are missing from the new Report900:
 - **(a) SR Incident Date is more than 48 HRS old:** The system will check their status in Report1166 and update the SRT status accordingly.
 - **(b) SR Incident Date is less than 48 HRS old:** The system will automatically update their status to "**Closed**".

(Please refer to the associated documentation for the specific lists of Considered/Not-Considered Barring Reasons, Restoration Reasons, and Account Segments).




Contact Information

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Thank you 